

School Facility Program

Assembly Bill 16 – COS Program

Office of Public School Construction
October 2002 – Workshop

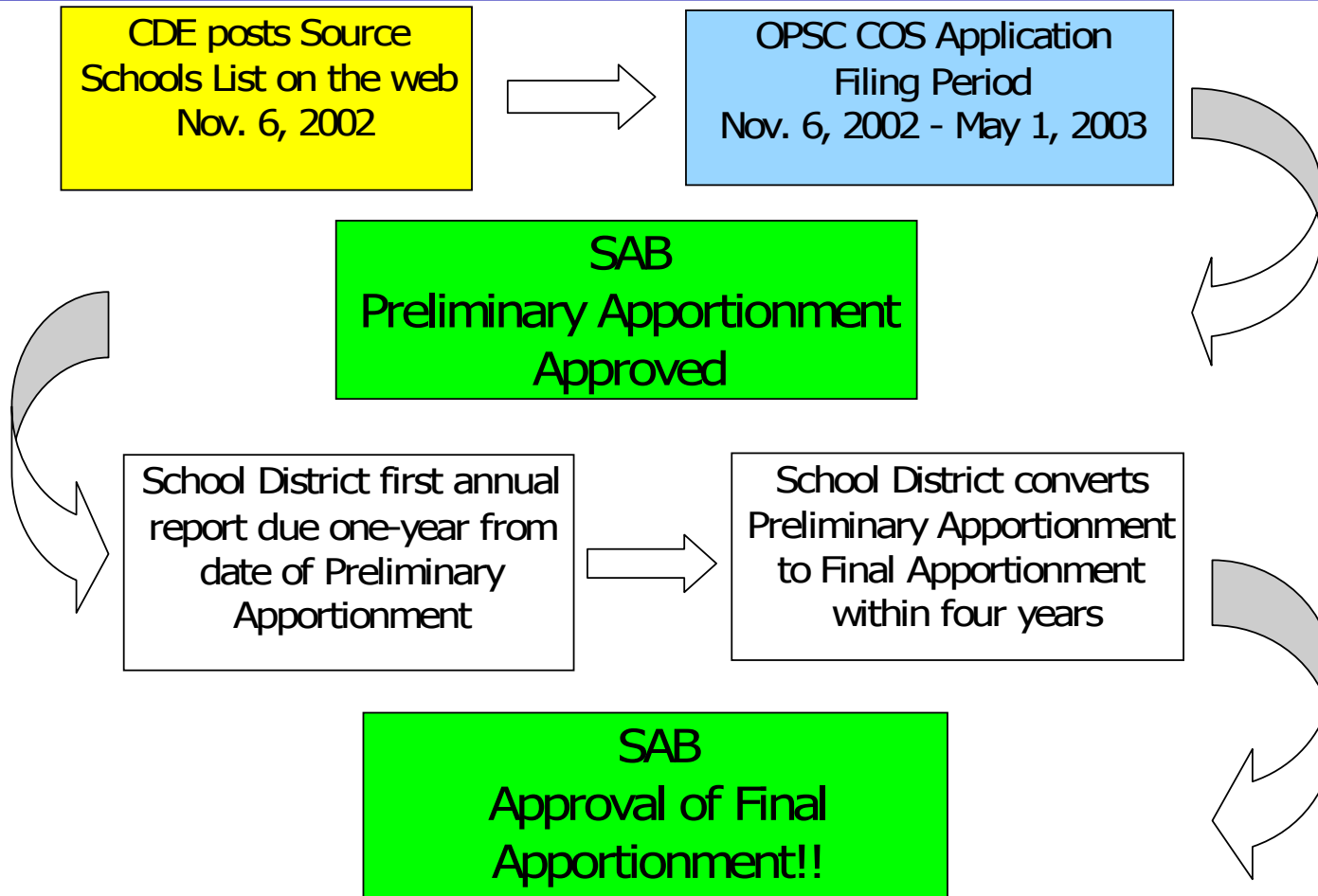
Topics of Discussion

- What is the COS Program
- CDE Source School List
- Determining Qualifying Pupils
- Preliminary Application
- Preliminary Apportionment Components
- Fund Distribution
- Project Ranking
- Project Progress Reporting
- Apportionment Conversion
- Questions

Critically Overcrowded School Facilities

- \$1.7 Billion in the 2002 Bond and \$2.44 Billion in the 2004 Bond.
- Allows for a reservation of funds (Preliminary Apportionment) for New Construction Projects.
- To qualify districts must have SFP New Construction Eligibility and a school(s) on the CDE Source School List.
- Must convert the Preliminary Apportionment within four years to a Final Apportionment.

Critically Overcrowded School Process



CDE Source School List

Identifies which schools are Critically Overcrowded for purposes of the COS Program.

- Pupils per acre site density of at least 115 for grades K-6 and 90 for grades 7-12.
(200% of CDE Standard)
- Must qualify using the 2001/2002 CBEDS Enrollment.

For information contact the CDE website at www.cde.ca.gov or Fred Yeager at 916.327.7148

CDE Source School List

SFPD Form 4.16

**Certification of Net Usable School Site Acres
for the Critically Overcrowded School Program
(Education Code 17078.15 (c))**

14 DIGIT CDS CODE	COUNTY	DISTRICT	SCHOOL	TYPE OF SCHOOL	NET USABLE ACRES	K-6 2001 OBEDS	7-12 2001 OBEDS	TOTAL 2001 OBEDS	SCHOOL SITE DENSITY	OOS THRESHOLD (90 or 115)
0161127- 0130450	Alameda	Albany City Unified	Albany High	HIGH SCHOOL	3.6000	-	862	862	239.4444	90
0161127- 6090146	Alameda	Albany City Unified	Cornell Elementary	ELEMENTARY	2.0000	419	-	419	209.5000	115
0161127- 6090161	Alameda	Albany City Unified	Albany Middle	MIDDLE	2.4000	301	545	846	352.5000	90
0161127- 6095376	Alameda	Albany City Unified	Marin Elementary	ELEMENTARY	2.4600	425	-	425	172.7642	115
0161127- 6116222	Alameda	Albany City Unified	Ocean View Elementary	ELEMENTARY	1.2500	437	-	437	349.6000	115

District Representative Certification:

I certify that the net usable acres are true and correct.

Signature: _____ Title _____ Date _____

COS Program Criteria

A proposed project qualifying for the COS program must meet the following criteria:

- Relieve overcrowding
- Have at least 75% of pupils come from the Source School(s).
- Be in the General Location of a Source School

Determining Qualifying Pupils

- Use the latest CBEDS at the Source School(s) at the time the District submits its Preliminary Application.
- Use the Useable Site Acreage on the CDE Source School List
- Use Site Density of 86 pupils per acre for Elementary Schools or 68 pupils per acre for Secondary Schools. (150% of CDE Standard)
- The number of pupils that exceed the Site Density are the Qualifying Pupils from that site.

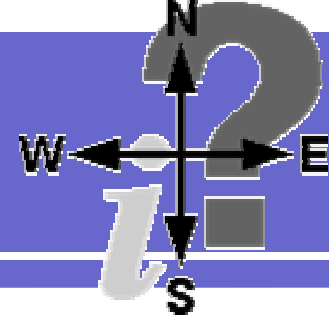
Qualifying Pupils Baseline Eligibility Chart

A	B	C	D	E	F	G	H	I	J
14-Digit CDS Code	County	District	School	CDE Useable Site Acreage	CDE COS Threshold (90 or 115)	QP Pupil Density Unloading Factor	QP Site Density (E x G)	Latest CBEDS	QP Eligibility (I - H)
0161127- 0130450	Alameda	Albany City Unified	Albany High	3.60	90	68	244.80	862	617
0161127- 6090146	Alameda	Albany City Unified	Cornell Elementary	2.00	115	86	172.00	419	247
0161127- 6090161	Alameda	Albany City Unified	Albany Middle	2.40	90	68	163.20	846	683
0161127- 6095376	Alameda	Albany City Unified	Marin Elementary	2.46	115	86	211.56	425	213
0161127- 6116222	Alameda	Albany City Unified	Ocean View Elementary	1.25	115	86	107.50	437	330

Adjustments to QP Eligibility

- A. COS Projects
- B. Rescinded Preliminary Apportionments
- C. CBEDS Enrollment Changes
- D. Site Density Changes (acreage amount)

General Location



- Elementary Source School(s)
 - Within the attendance area; or
 - One mile radius. (whichever is greater)
- Middle, Junior High or High Source School(s)
 - Within the attendance area; or
 - Three mile radius. (whichever is greater)
- Within the CDE Approved Variance.

Preliminary Application

- Identifies the number of SFP and Qualifying Pupils assigned to the project.
- Identifies which Source School(s) will be served.
- Determines the Preliminary Apportionment amount.

APPLICATION FOR PRELIMINARY APPORTIONMENT

SCHOOL FACILITY PROGRAM

SAB 50-08 (NEW 09/02)

Page 3 of 4

The school district named below applies to the State Allocation Board via the Office of Public School Construction for a Preliminary Apportionment under the provisions of Chapter 12.5, Part 10, Division 1, Article 11, commencing with Section 17078.10, et seq. of the Education Code and the Regulations thereto.

SCHOOL DISTRICT	PRELIMINARY APPLICATION NUMBER
PROPOSED PROJECT NAME	PROJECT TRACKING NUMBER
COUNTY	HIGH SCHOOL ATTENDANCE AREA (IF APPLICABLE)

1. Type of Project

☐ Elementary School ☐ Middle School ☐ High School

Pupils Assigned:

K-6: _____

7-8: _____

9-12: _____

Non-severe: _____

Severe: _____

Addition to existing site? ☐ Yes ☐ No

If yes, school name _____

2. Financial Hardship Request – (must have pre-approval by OPSC)**3. Number of Classrooms/Useable Acres**

Number of Classrooms: _____

Existing Useable Acres: _____

Proposed Useable Acres: _____

4. Source School(s)

LIST SOURCE SCHOOL

QUALIFYING PUPILS ASSIGNED

5. Increase in Preliminary Apportionmenta. ☐ Multilevel Construction

b. Site Acquisition:

• 50 percent appraised value or median cost: \$ _____

• Relocation/DTSC Cost:

☐ 21 Percent☐ 50 percent of specific or historical cost: \$ _____

c. Site Development:

☐ \$70,000 per proposed Useable Acre☐ 50 percent of specific or historical cost: \$ _____d. ☐ Small New School Allowancee. ☐ Urban Allowancef. ☐ Geographic Percentage Factor: _____ %**6. Adjustment to New Construction Baseline Eligibility**

Additional Classrooms Provided:

K-6: _____

7-8: _____

9-12: _____

Non-severe: _____

Severe: _____

7. Operational Grants (HSAA Only)

Number of Pupils:

K-6: _____

7-8: _____

9-12: _____

Non-severe: _____

Severe: _____

8. Pending Reorganization Election☐ Yes ☐ No**9. Priority Order #** _____

Preliminary Apportionment Components

- Pupil Base Grant
- Multilevel Construction
- Site Acquisition
- Site Development
- Project Increases
- Financial Hardship
- Inflator Factor

Preliminary Apportionment Components

- Pupil Base Grant Amount
 - SFP per Un-housed Pupil Grant,
and
 - SFP Automatic Fire Detection/Alarm System Grant
- Multilevel Construction Amount
 - 12 percent of Pupil Base Grant

Preliminary Apportionment Components

- Site Acquisition Amount
 - Property Value
 - Appraisal, or
 - Preliminary Appraisal, or
 - Median Cost
 - 4% of Property Value (minimum \$50,000)
 - DTSC and Relocation Costs
 - 21% of Property Value
 - Actual Cost
 - Historical Cost

Preliminary Apportionment Components

- Site Development Amount
 - \$70,000 per Proposed Useable Acres
 - Actual Cost
 - Historical Cost
- Project Increase Amount
 - Small New School
 - Urban Location/Security Requirements/Impacted Site
 - Geographic Location

Preliminary Apportionment Components

- Financial Hardship Amount
 - Pre-qualified by OPSC
 - State Share Amount minus District Contribution
- Inflator Factor Amount
 - 12 percent of all Previous Amounts

Preliminary State Apportionment Amount

Pupil Base Grant	\$ 4,599,600.00
Multilevel Construction	\$ 551,952.00
Site Acquisition	\$ 6,250,000.00
Site Development	\$ 700,000.00
Project Increases	\$ 367,968.00
Project Subtotal	\$12,469,520.00
Inflator Factor	<u>X</u> 12%
Reservation Amount	\$13,965,862.00



Fund Distribution

- Transfers from COS to SFP
 - Funds exceeding all the Preliminary Apportionments plus 15% shall be transferred to the SFP New Construction Account.
 - Unrestricted Funds in the COS at the end of the maximum timeframe (5 years).
- COS Account Funds
 - Any rescinded Preliminary Apportionments will remain to fund project increases.
 - Any funds available from project decreases will be made available to fund other projects' increases.
 - If funds are unavailable for project increases, the increased amount may be placed on an unfunded list until funds become available or the maximum timeframe of the program has expired.

Project Ranking

- When funds are insufficient for all Preliminary Applications received, the SAB will first apportion projects with the highest Source School(s) pupil density level.
 - Determine a project's apportionment priority by adding the results of Step Three for each Source School assigned:
- Step One:
 - Divide the CBEDS by the Useable Acres
 - Divide quotient above by 115 or 90
 - Step Two:
 - Divide school's QPs by total QPs assigned
 - Step Three:
 - Multiply Steps One and Two

Project Ranking (Example)

Source Schools Assigned	QPs Assigned	Percentage of Total QPs	Percent Beyond Threshold	Ranking
Cornell ES	247	0.4117	0.8217	0.3383
Marin ES	213	0.3550	0.5023	0.1783
Ocean View ES	140	0.2333	2.0400	0.4760
TOTAL =		600	RANK=	0.9926

Percent Beyond Threshold Calculation: Cornell ES

$$419 \div 2.0 = 209.5$$

$$209.5 \div 115 = 1.8217$$

$$1.8217 - 1 = .8217$$

Reporting Requirements

First Annual

Includes CDE certification there is at least one approvable site within the general location, and the general location serves the qualifying pupils in the preliminary application; or Preliminary Apportionment is rescinded.

Annual Report to the SAB

Due every 12 months after Preliminary Apportionment date. Includes project progress information discussion at school board public hearing.

Year Four

The school district converts the Preliminary Apportionment to a Final Apportionment; receives a time extension; or Preliminary Apportionment is rescinded.

One-Year Extension Requirements

- CDE contingent or final site approval, and
- Final plans submitted to DSA for review and approval.

or

- Other evidence satisfactory to the SAB (narrative).

Apportionment Conversion

To convert a Preliminary Apportionment to a Final Apportionment:

- Must have SFP Eligibility for at least 75% of pupils included in Preliminary Apportionment
- Meet all SFP criteria for filing a SAB 50-04 for an adjusted grant.
- Financial Hardship districts must have current financial hardship approval.

Questions...